

Revision: HCFA-PM-91-4 (BPD)  
August 1991

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OMB No.: 0938-

State: Tennessee

Citation	Condition or Requirement
42 CFR 435.732, 435.831	<p>4. Handling of Excess Income - Spend-down for the Medically Needy in All States and the Categorically Needy in 1902(f) States Only</p> <p>a. <u>Medically Needy</u></p> <p>(1) Income in excess of the MNIL is considered as available for payment of medical care and services. The Medicaid agency measures available income for periods of <u>1</u> month(s) (not to exceed 6 months) to determine the amount of excess countable income applicable to the cost of medical care and services.</p> <p>(2) If countable income exceeds the MNIL standard, the agency deducts the following incurred expenses in the following order:</p> <p>(a) Health insurance premiums, deductibles and coinsurance charges.</p> <p>*(b) Expenses for necessary medical and remedial care not included in the plan.</p> <p>(c) Expenses for necessary medical and remedial care included in the plan.</p> <p>..... Reasonable limits on amounts of expenses deducted from income under a.(2)(a) and (b) above are listed below.</p> <p>* For any medical expense authorized by State law.</p>
1902(a)(17) of the Act	<p>Incurred expenses that are subject to payment by a third party are not deducted unless the expenses are subject to payment by a third party that is a publicly funded program (other than Medicaid) of a State or local government.</p>

No. 92-7  
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Citation

Condition or Requirement

a. Medically Needy (Continued)

1903(f)(2) of \_\_\_\_\_ (3) If countable income exceeds the MNIL standard,  
the agency deducts spenddown payments made to  
the State by the individual.

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42 CFR  
435.732

b. Categorically Needy - Section 1902 (f) States

The agency applies the following policy under the provisions of section 1902(f) of the Act. The following amounts are deducted from income to determine the individual's countable income:

- (1) Any SSI benefit received.
- (2) Any State supplement received that is within the scope of an agreement described in sections 1616 or 1634 of the Act, or a State supplement within the scope of section 1902(a)(10)(A)(ii)(XI) of the Act.
- (3) Increases in OASDI that are deducted under 435.134 and 435.135 for individuals specified in that section, in the manner elected by the State under that section.
- (4) Other deductions from income described in this plan at Attachment 2.6-A, Supplement 4.
- (5) Incurred expenses for necessary medical and remedial services recognized under State law.

1902(a)(17) of the  
Act, P.L. 100-203

Incurred expenses that are subject to payment by a third party are not deducted unless the expenses are subject to payment by a third party that is a publicly funded program (other than Medicaid) of a State or local government.

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4.b. Categorically Needy - Section 1902(f) States  
Continued

1903(f)(2) of \_\_\_\_\_ (6) Spenddown payments made to the State by the individual.

NOTE: FFP will be reduced to the extent a State is paid a spenddown payment by the individual.

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Condition or Requirement

5. Methods for Determining Resources

a. AFDC-related individuals (except for poverty level related pregnant women, infants, and children).

(1) In determining countable resources for AFDC-related individuals, the following methods are used:

(a) The methods under the State's approved AFDC plan; and

---(b) The methods under the State's approved AFDC plan and/or any more liberal methods described in Supplement 8b to ATTACHMENT 2.6-A.

(2) In determining relative financial responsibility, the agency considers only the resources of spouses living in the same household as available to spouses and the resources of parents as available to children living with parents until the children become 21.

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Condition or Requirement

5. Methods for Determining Resources

1902(a)(10)(A),  
1902(a)(10)(C),  
1902(m)(1)(B)  
and (C), and  
1902(r) of the Act

b. Aged individuals. For aged individuals,  
including individuals covered under  
section 1902(a)(10)(A)(ii)(X) of the Act,  
the agency used the following methods for  
treatment of resources:

..... The methods of the SSI program.

X..... SSI methods and/or any more liberal methods  
described in Supplement 8b to ATTACHMENT  
2.6-A.

..... Methods that are more restrictive (except for  
individuals described in section 1902(m)(1) of the  
Act) and/or more liberal than those of the SSI  
program. Supplement 5 to ATTACHMENT 2.6-A  
describes the more restrictive methods and  
Supplement 8b to ATTACHMENT 2.6-A specifies the  
more liberal methods.

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In determining relative financial responsibility, the agency considers only the resources of spouses living in the same household as available to spouses.

1902(a)(10)(A),  
1902(a)(10)(C),  
1902(m)(1)(B), and  
1902(r) of the  
Act

c. Blind individuals. For blind individuals the agency uses the following methods for treatment of resources:

\_\_\_\_\_ The methods of the SSI program.

X \_\_\_\_\_ SSI methods and/or any more liberal methods described in Supplement 8b to ATTACHMENT 2.6-A.

\_\_\_\_\_ Methods that are more restrictive and/or more liberal than those of the SSI program. Supplement 5 to ATTACHMENT 2.6-A describe the more restrictive methods and Supplement 8b to ATTACHMENT 2.6-A specify the more liberal methods.

In determining relative financial responsibility, the agency considers only the resources of spouses living in the same household as available to spouses and the resources of parents as available to children living with parents until the children become 21.

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1902(a)(10)(A), 1902(a)(10)(C), 1902(m)(1)(B) and (C), and 1902(r)(2) of the Act	<p>d. <u>Disabled individuals, including individuals covered under section 1902(a)(10)(A)(ii)(X) of the Act. The agency uses the following methods for the treatment of resources:</u></p> <p>_____ The methods of the SSI program.</p> <p><u>X</u> SSI methods and/or any more liberal methods described in <u>Supplement 8a to ATTACHMENT 2.6-A.</u></p> <p>_____ Methods that are more restrictive (except for individuals described in section 1902(m)(1) of the Act) and/or more liberal than those under the SSI program. More restrictive methods are described in <u>Supplement 5 to ATTACHMENT 2.6-A</u> and more liberal methods are specified in <u>Supplement 8b to ATTACHMENT 2.6-A.</u></p> <p>In determining relative financial responsibility, the agency considers only the resources of spouses living in the same household as available to spouses and the resources of parents as available to children living with parents until the children become 21.</p>
1902(l)(3) and 1902(r)(2) of the Act	<p>e. <u>Poverty level pregnant women covered under sections 1902(a)(10)(A)(i)(IV) and 1902(a)(10)(A)(i)(IX)(A) of the Act.</u></p> <p>The agency uses the following methods in the treatment of resources.</p> <p>_____ The methods of the SSI program only.</p> <p>_____ The methods of the SSI program and/or any more liberal methods described in <u>Supplement 5a or Supplement 8b to ATTACHMENT 2.6-A.</u></p>



Citation	Condition or Requirement
	10. Treatment of Income and Resources - Categorically and Medically Needy and Qualified Medicare Beneficiaries
	a. AFDC related individuals (other than under items 9.e. and f. below)
	The agency uses the same methodologies for treatment of income and resources as used in the State's approved AFDC State plan.
1902(a)(10)(A), 1902(a)(10)(C), and 1902(m)(1)(B) and (C) of the Act, P.L. 99-509 (Section 9402(a))	b. Aged individuals, including individuals covered under section 1902(a)(10)(A)(ii)(X) of the Act
	<u>X</u> The agency uses the same methodologies for treatment of income and resources as used in the SSI program (or the optional State supplement program which meets the requirements of 42 CFR 435.230, as appropriate).
	— The agency uses methodologies for treatment of income and resources that differ from those of the SSI program. These differences result from restrictions applied under section 1902(f) of the Act. The methodologies are described in Supplement 5 to <u>ATTACHMENT 2.6-A</u> .
	c. Blind individuals
	<u>X</u> The agency uses the same methodologies for treatment of income and resources as used in the SSI program (or the optional State supplement program which meets the requirements of 42 CFR 435.230, as appropriate).
	— The agency uses methodologies for treatment of income and resources that differ from those of the SSI program. These differences result from restrictions applied under section 1902(f) of the Act.

Effective 1/1/89, more liberal method used for treatment of income under 1902 (r)(2) of the Act. (See Supplement 11a to Attachment 2.6A).

Effective 1/1/89, more liberal method used for treatment of income under 1902 (r)(2) of the Act. (See Supplement 11a to Attachment 2.6A).

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Citation	Condition or Requirement
	10. Treatment of Income and Resources - Categorically and Medically Needy and Qualified Medicare Beneficiaries
	a. AFDC related individuals (other than under items 9.e. and f. below)
	The agency uses the same methodologies for treatment of income and resources as used in the State's approved AFDC State plan.
1902(a)(10)(A), 1902(a)(10)(C), and 1902(m)(1)(B) and (C) of the Act, P.L. 99-509 (Section 9402(a))	b. Aged individuals, including individuals covered under section 1902(a)(10)(A)(ii)(X) of the Act
	<u>X</u> The agency uses the same methodologies for treatment of income and resources as used in the SSI program (or the optional State supplement program which meets the requirements of 42 CFR 435.230, as appropriate).
	— The agency uses methodologies for treatment of income and resources that differ from those of the SSI program. These differences result from restrictions applied under section 1902(f) of the Act. The methodologies are described in Supplement 5 to <u>ATTACHMENT 2.6-A</u> .
Effective 1/1/89, more liberal method used for treatment of income under 1902 (r)(2) of the Act. (See Supplement 11 b to Attachment 2	c. Blind individuals
	<u>X</u> The agency uses the same methodologies for treatment of income and resources as used in the SSI program (or the optional State supplement program which meets the requirements of 42 CFR 435.230, as appropriate).
	— The agency uses methodologies for treatment of income and resources that differ from those of the SSI program. These differences result from restrictions applied under section 1902(f) of the Act.